User Manual

LOGIN

a. From the home page, select "Investor Login", which directs you to the File Manager Login Screen
b. Click on the FILE MANAGER CLIENT LOGIN (left) icon only
c. Enter your username & password
d. A successful login directs you to the File Manager

FILE MANAGER MAIN SCREEN

a. Search box: Quickly locate important files with built-in search facility. Search by any part of the file name. For example to display all 2012 statement files type 2012 in the search field.
b. Sort Filter: Sort by file name (by clicking on the heading 'Name") or sort by date (by clicking on the heading "Date")

VIEW CONTENTS OF A FILE

a. Either click directly on the file or click in the check box next to the file and then click "Preview"
b. File will open in a SMALL window. Expanding or Fully Opening Window will also Enlarge TEXT Size.

LENDING DOCUMENTS FOLDER

a. Click on the word "Lending Documents" next to the icon
b. Once you are in the Lending Documents Folder you may click on the "Up" icon to return to your user folder
c. Use above instructions for searching, sorting and viewing

TO EXIT:

click Exit Icon